

**Welcome!**

**Data + Mail Merge =MAGIC!**

*Penny Pearson, Facilitator*

*OTAN*

# Mail Merge

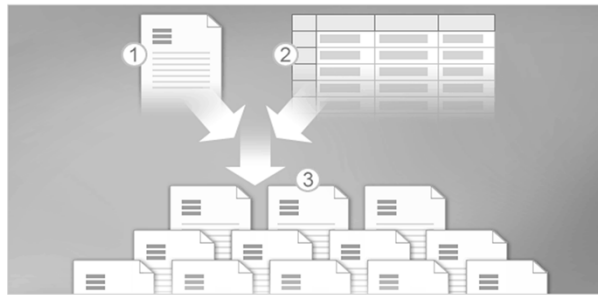
Personalize communication with students

3 parts: Main document, data source, results

Results are: letters, name badges, certificates, labels, email...

The Process...

Then Practice!!



Penny talks about mail merge – 3 parts

Data source (from tops pro)

Main document ( certificate, labels, letters etc.)

Results - your data showing up on the main document as a new “set” of letters, labels, certificates, etc.

Use the main document over and over again with different data sources.

Show how to “pick” from within data source different criteria – i.e. hours vs 2 level gains, vs EL Civics etc... [Use select recipients and ‘filtering’ for this... easier than doing Excel as a database. ]

## Objectives for our Session

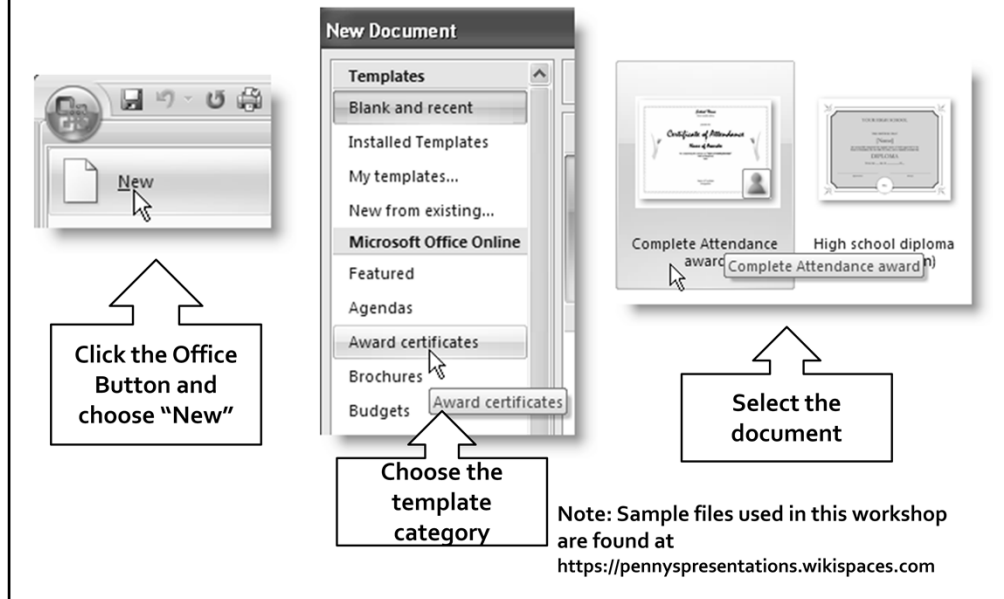
- Download necessary files.
- Understand the fundamental steps to using Mail Merge.
  - Create a main document
  - Create a data document
  - Merge the data with the main document.
- Preview the steps for this process.
- Practice, practice, practice!

## Download Files

- Go to  
<http://pennyspresentations.wikispaces.com>
- Click on the "Download" link for each file:
  - Copy of Student Sample.xlsx
  - Certificate of Attendance Main Document.doc
  - Mail Merge – Cheat Sheet.pdf
- Save each file to the desktop. (Make sure to enable editing if needed.)

**These sample files follow the presentation. However, you can always use your own files too.**

## Create your main document



The steps are similar in Word 2003.

Most templates can be "downloaded" from the Microsoft Office site.

## Customize your document

*School Name*  
School complete address

presents this

**Certificate of Attendance**

to  
*Name of Awardee*

for completing the seminar on "Name of Activity/Seminar"  
Held at the (place)  
Date

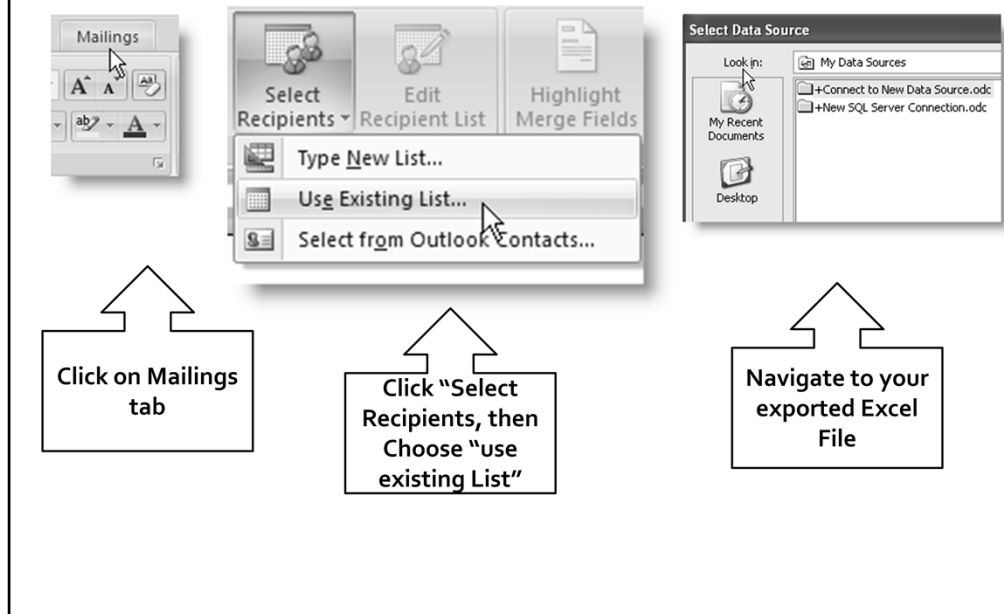
Name of Facilitator  
Designation

Add 'static' information (it doesn't change)

**Open the file *Certificate of Attendance Main Document.doc***

Select the text for School Name and fill it in with your school's information. Do the same for the address, and any other information you want reflected on each certificate

## Link your document to your data



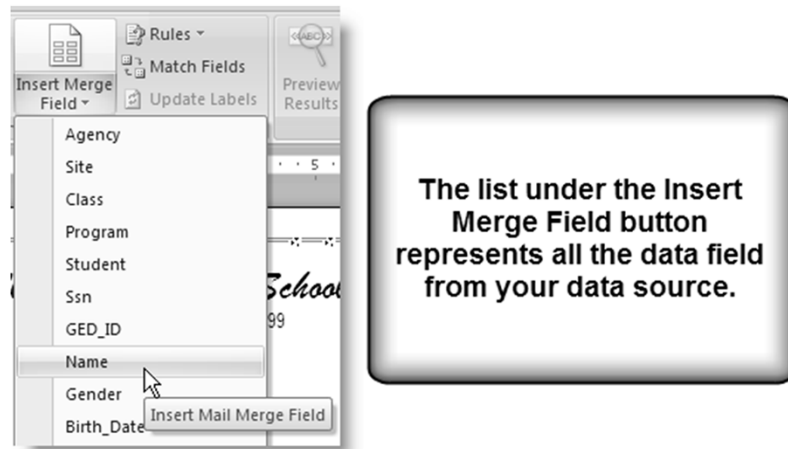
To customize the information on what class was completed and what program, specific fields need to be added to replace the text *"Name of Activity/Seminar."* To do this, you must *link* the data file to our main Certificate document.

Click on the Mailings tab in the Ribbon and click on Select Recipients.

Click on Use Existing List. In the Select Data Source window navigate to where your data file is stored. Select it and click Open.

In the Select Table dialog box, you must select which sheet within your workbook is the one that has the information on it you wish to use. In this case for the Session Roster, choose PPs Monitor and click OK.

## Embed Personalized Fields



The next steps involve placing the correct field names where you wish the data to appear on your certificate. Select the text *Name of Awardee*.



Select "Name of Awardee"

*Certificate of Attendance*

to

*Name of Awardee*

for completing the seminar on "Name of Activity/Seminar"

Held at the(place)

Date

Be sure your cursor is where you want your data to appear!

Now click on the Insert Merge Field from the Mailings Ribbon at the top of the page.

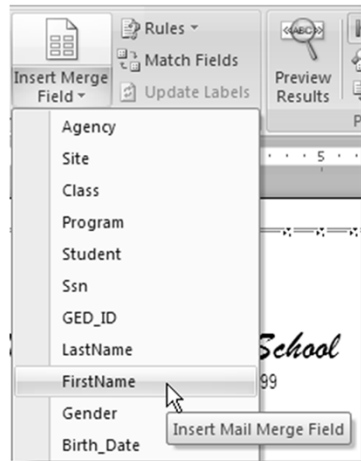
Click on Name to insert that field into your Certificate document. It appears like this: <<Name>> The brackets indicate this is a data field. Do not try and TYPE this into your document. You must use the Insert Merge Field option.

Next you must enter the fields that represent the program, class and any other information you want on your certificate. Select the text "seminar on "Name of Activity/Seminar."

Click on the Insert Merge Field button and select Program to insert this field into your certificate.

Follow the same process to insert the field Class after Program. (Be sure you put a space between the two field!)

## Add your field names

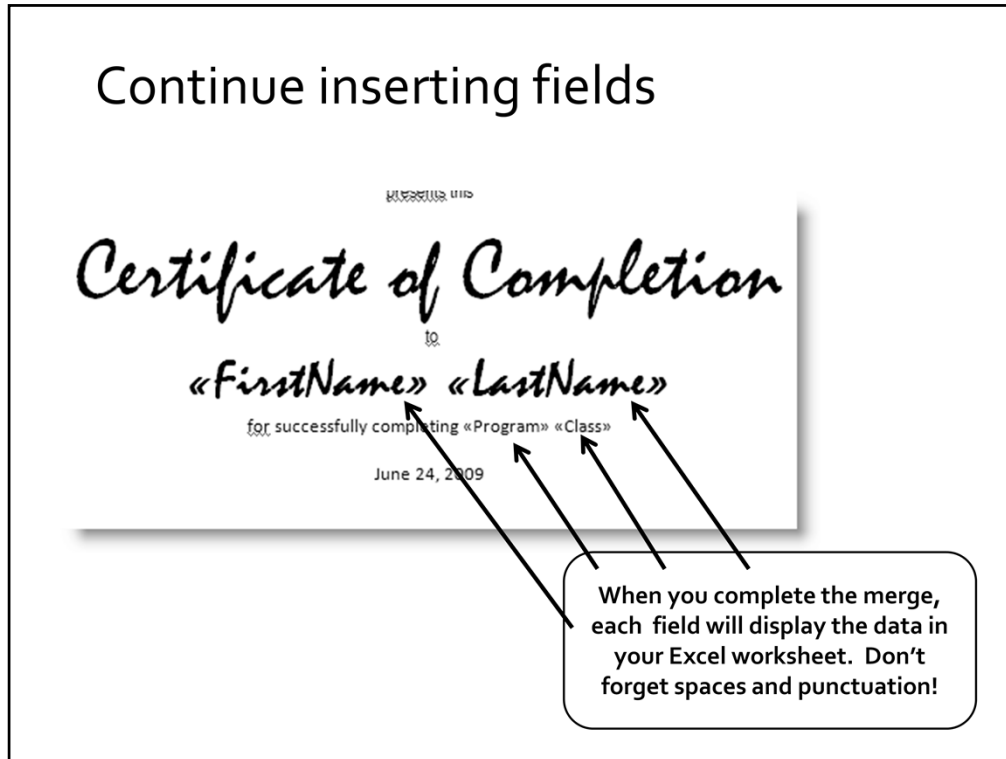


Click "Insert Merge Field" drop down

Click FirstName (or any other field you want to appear in this spot)

**These are the field names from the data source that is linked to your main document. If you change that data document, this list will change.**

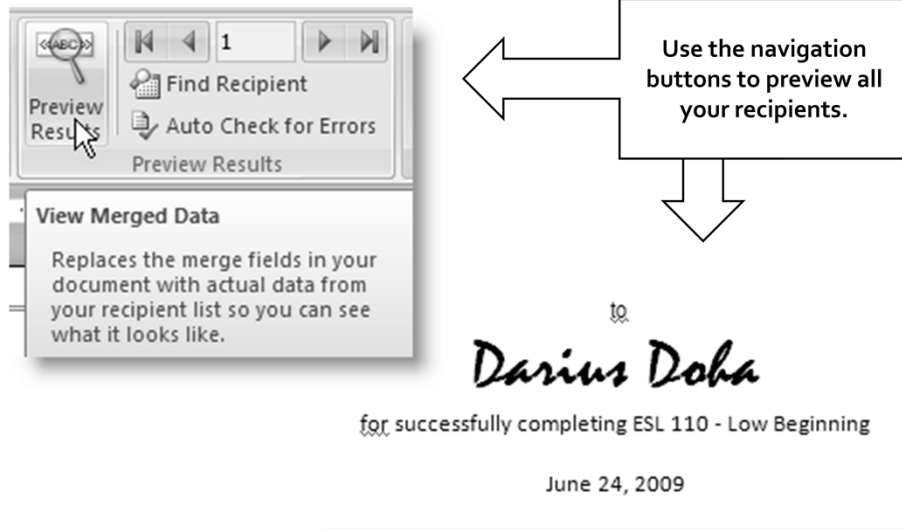
## Continue inserting fields



One of the key things you need to do to make your mail merge successful on the “first try” is make SURE your data is accurate {for example; no spaces before or after the data in the individual fields} If your data is not good, your merged documents will not be either!

Secondly, you always need to add any necessary spacing and punctuation around your field names. Even if your information wraps to a second line! Trust that when you do the merge, everything will look nice. {You often can have field names that are longer than the actual data in the fields.}

## Preview your document

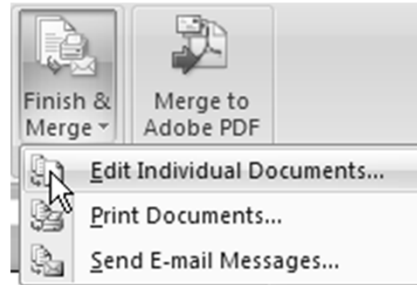


**ALWAYS** preview your documents to check for any problems with the data, **OR** the spacing and punctuation. (See previous slide!)

## Ready to merge!



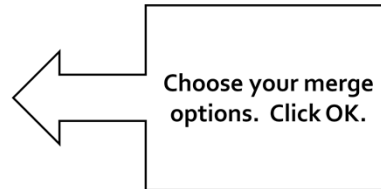
Click on "Finish & Merge" in the ribbon



Choose "Edit Individual Documents" to get a separate file of *each* of your records. You can add special information to a certificate that was not in your data document.

When everything looks good, you can then complete the merge. You have choices so feel free to experiment.

## Merge options



**In the case of certificates, you may want to keep the final document with all the certificates as it will allow you to go back and either ADD additional information to ONE certificate. Or later, come back and print just one certificate if needed.**

# MAGIC! 😊



# Your Turn! Practice!

*Let's get started!*

**Be sure you have the necessary files:**

**Data document (excel file)**

**Certificate document (Main document)**

**Save to your desktop or flash drive.**

**Open the Cheat sheet to help guide you through the process.**